**Exercise: Creating a Quotation Template in Odoo**

**Objective:** Configure Odoo Sales module to create a customized quotation template.  
**Help:** [Quotation templates — Odoo 17.0 documentation](https://www.odoo.com/documentation/17.0/applications/sales/sales/send_quotations/quote_template.html)  
**Prerequisites:**

* Access to an Odoo instance with administrator rights.

**Steps:**

1. **Login to Odoo:**
   * Open your web browser and navigate to your Odoo instance.
   * Log in with administrator credentials.
2. **Navigate to Sales Module:**
   * Go to the Sales module from the main dashboard.
3. **Create a Product:**
   * Navigate to Sales > Products > Products.
   * Click on "Create" to add a new product or edit an existing one.
   * Fill in product details such as name, description, and price.
   * Save the product.
4. **Set Up Quotation Template:**
   * Navigate to Sales > Configuration > Settings.
   * Under the 'Quotations & Sales Orders' section, enable the option for 'Quotation Templates.'
   * Save the changes.
5. **Create a Quotation Template:**
   * Go to Sales > Configuration > Quotation Templates.
   * Click on "Create" to add a new quotation template.
   * Specify the template name, description, and other relevant details.
   * Add the product(s) you want to include in the template by clicking on the "Add a line" button.
   * Set quantities, taxes, and any other applicable information.
   * Save the template.
6. **Customize Quotation Template Layout:**
   * Click on the 'Edit' button of the created quotation template.
   * Customize the layout using Odoo's built-in HTML editor.
   * Add dynamic content using placeholders like ${object.field\_name}.
   * For example, you can use ${object.partner\_id.name} to dynamically insert the customer's name.
   * You can also add static text, images, and formatting as needed.
   * Save the changes.
7. **Preview the Quotation:**
   * Save the changes to the template.
   * Create a new quotation by going to Sales > Quotations > Quotations and clicking on "Create."
   * Apply the newly created quotation template by selecting it from the "Quotation Template" field in the quotation form.
   * Click on the "Preview" button to ensure that the template is applied correctly and the layout is as expected.
   * Make any necessary adjustments and save the quotation.
8. **Test Quotation Generation:**
   * Create a few sample quotations using the template.
   * Verify that the template generates quotations with the specified layout and content.
   * Check that product details, quantities, and any dynamic fields are correctly populated.
9. **Adjust and Iterate:**
   * Based on feedback and testing, make any necessary adjustments to the template.
   * Iterate on the design and content until the quotation template meets the desired requirements.
   * Consider involving sales and marketing teams to gather feedback on the template's effectiveness.
10. **Finalize and Deploy:**

* Once satisfied with the quotation template, finalize it.
* Ensure that all team members are aware of the new template and start using it for creating quotations.
* Provide training or documentation on how to use the template effectively.

**Conclusion:** Congratulations! You have successfully created and configured a quotation template in Odoo. This exercise helps streamline the quotation creation process and ensures consistency in the presentation of sales quotes.